

TX – 070 – Service Records Using Employee Letters

What will be covered:

This session will demonstrate how to generate service records using the Employee Letters option

- Create a Service Records Employee Letter template
 - Setting up the format
 - Selecting fields to report
 - Creating the Employee Letters

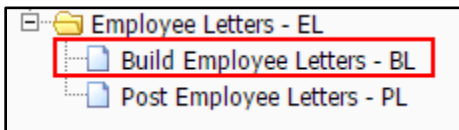
Links to additional resources

[Link to supplemental handout for service records using employee letters](#)

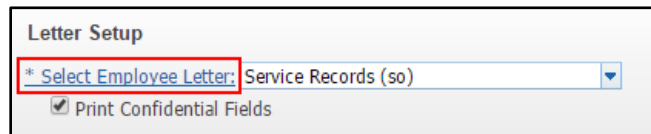
Supplemental Handout for Service Records Using Employee Letters

Session 7P – Texas User Group 2017

1. Extract your Service Records
2. Navigate to Employee Administration > Employee Management > Reports > Employee Letters > Build Employee Letters



3. Add a new template
 - a. Give your template a name
 - b. Select the EM Plan(s)
 - c. Set your Selection Parameters
 - d. Select Employee Letter *Note, to create a NEW letter, click the Select Employee Letter button



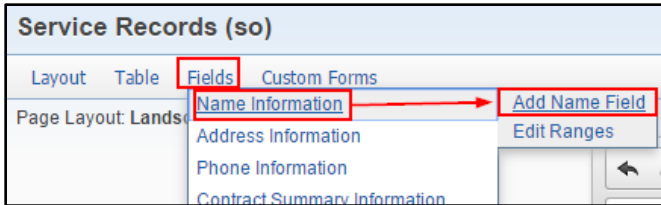
- i. Click Add to build a new letter

Building the Service Record Employee Letter:

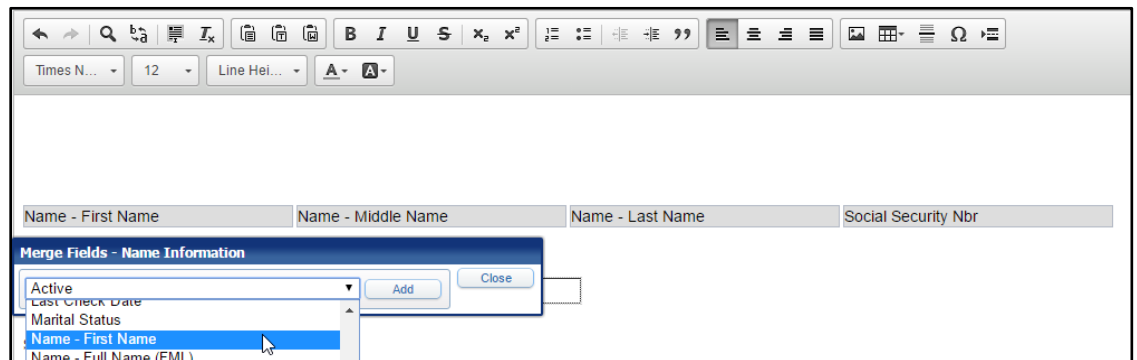
1. When the blank template appears, press your Enter key several times to leave several blank lines at the top of the page. This will allow you to later insert an image (district logo, etc.)
2. Click the Layout tab and select Landscape.



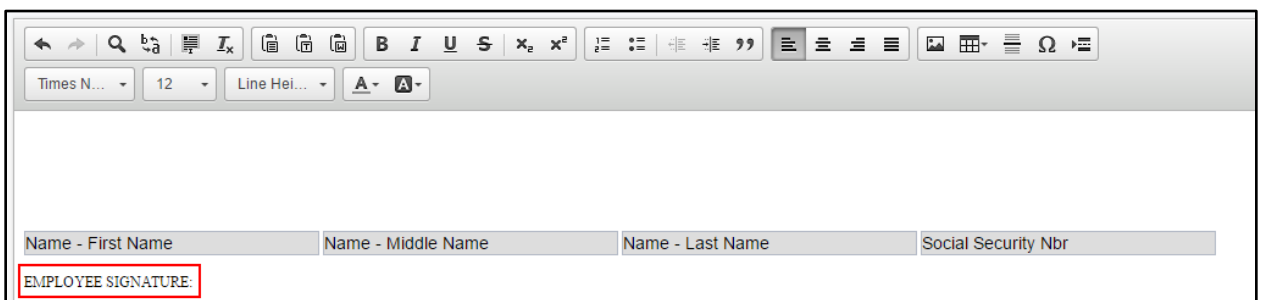
3. Click Fields > Name Information > Add Name Field



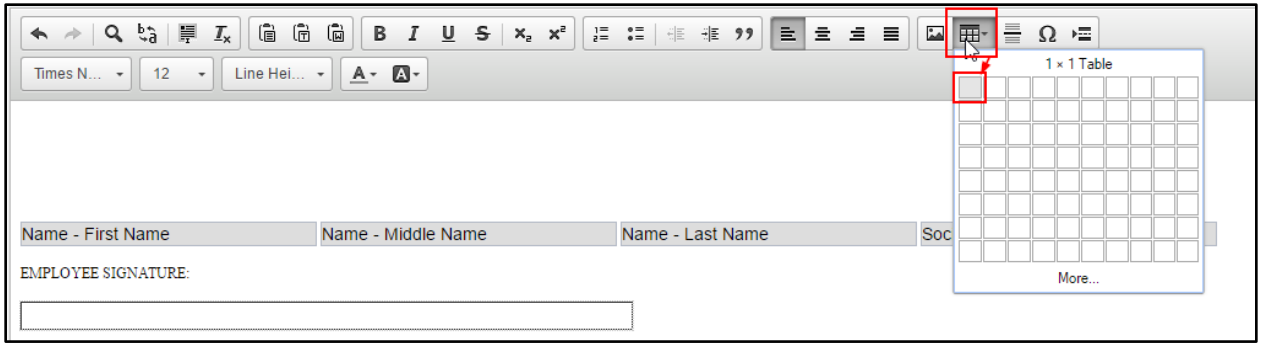
- a. Choose "Name – First Name" ... Add
- b. Use your Space Bar to enter a space after the First Name field
- c. Choose "Name – Middle Name" ... Add
- d. Use your Space Bar to enter a space after the Middle Name field
- e. Choose "Name – Last Name" ... Add
- f. Use your Space Bar to enter a space after the Last Name field
- g. Choose "Social Security Nbr" ... Add ... Close



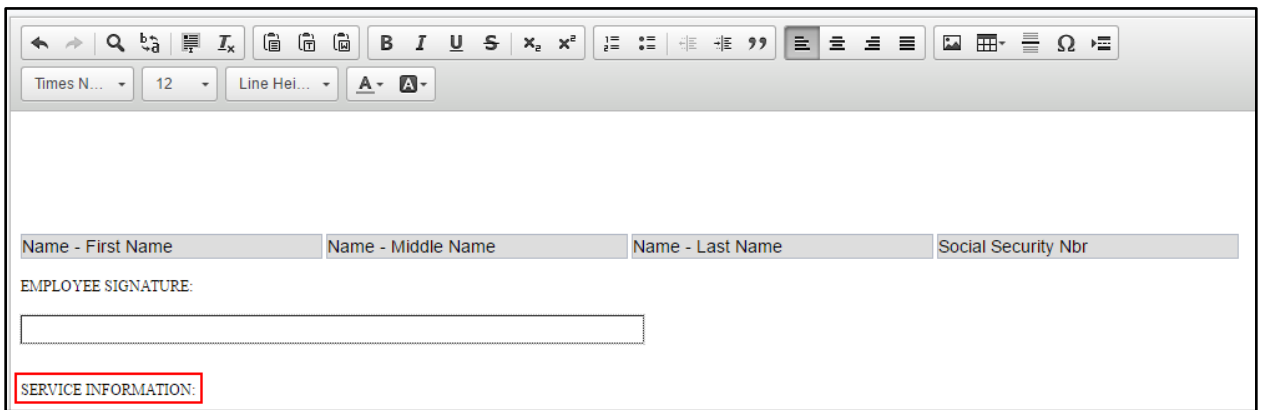
4. Press your Enter key twice. Type "EMPLOYEE SIGNATURE"



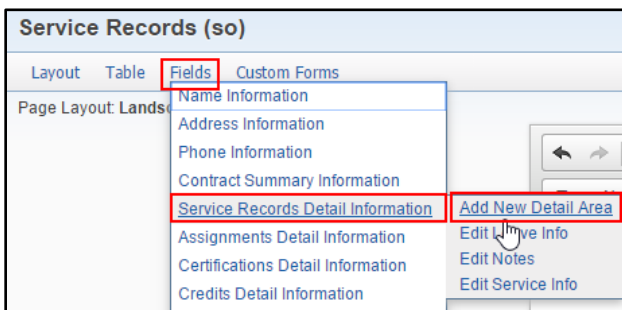
5. Press your Enter key twice. Click the "Table" icon at the top of the browse and enter a table 1x1



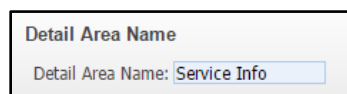
6. Press your Enter key three times. Type “SERVICE INFORMATION”



7. Press your Enter key twice. Click Fields > Service Record Detail Information > Add New Detail Area



- a. In the “Detail Area Name”, type “Service Info”



- b. For Display Options, check the box for “Create Block Information Horizontally”

Display Options

Create Block Information Horizontally

- c. Select the following fields – in this order (and be sure that box boxes get checked)
- i. School Year
 - ii. State or Country
 - iii. County or Equivalent
 - iv. School District or Institution
 - v. Public or Private
 - vi. Position Held
 - vii. Position (Line 2)
 - viii. Years of Experience
 - ix. Percent Day Employed
 - x. Number of Days Employed
 - xi. Indicate if a full semester
 - xii. Dates of Service From
 - xiii. Dates of Service To
 - xiv. Authorized Signature, Title, Official Stamp

Service Records Fields				
Available Fields				Edit All Ranges
Move	Field	Select	Display	Ranges
↕	School Year	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	State or Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	County or Equivalent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	School District or Institution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Public or Private	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Position Held	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Position (Line 2)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Years of Experience	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Percent Day Employed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Number of Days Employed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Indicate if a full semester	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Dates of Service From	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Dates of Service To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
↕	Authorized Signature, Title, Official Stamp	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

- d. Click Save. The fields will display across the page. They will not all display on the screen, however, when you print the service records, all the fields will be visible

Form editor interface showing a table with the following columns: School Year, State or Country, County or Equivalent, School District or Institution, Public or Private, Position Held, and Position (Line 2). The table is currently empty.

8. Press your Enter key three times. Type "LEAVE INFORMATION"

The form editor shows the same table as above. Below the table, the text "LEAVE INFORMATION:" has been entered in a new row, highlighted with a red box.

9. Press your Enter key twice. Click Fields > Service Record Detail Information > Add New Detail Area

The "Service Records (so)" menu is open, with "Fields" selected. The list of options includes: Name Information, Address Information, Phone Information, Contract Summary Information, Service Records Detail Information, Assignments Detail Information, Certifications Detail Information, and Credits Detail Information. The "Add New Detail Area" option is highlighted with a red box.

a. In the "Detail Area Name", type "Leave Info"

The "Detail Area Name" dialog box is shown. The "Detail Area Name" field contains the text "Leave Info".

- b. For Display Options, check the box for “Create Block Information Horizontally”

Display Options

Create Block Information Horizontally

- c. Select the following fields – in this order (and be sure that box boxes get checked)
- i. School Year
 - ii. Sick Leave – Prior Balance
 - iii. Sick Leave – Earned
 - iv. Sick Leave – Used
 - v. Sick Leave – Ending Balance
 - vi. Personal Leave – Prior Balance
 - vii. Personal Leave – Earned
 - viii. Personal Leave – Used
 - ix. Personal Leave – Ending Balance

Service Records Fields				
Available Fields			Edit All Ranges	
Move	Field	Select	Display	Ranges
	School Year	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Sick Leave - Prior Balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Sick Leave - Earned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Sick Leave - Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Sick Leave - Ending Balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Personal Leave - Prior Balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Personal Leave - Earned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Personal Leave - Used	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Personal Leave - Ending Balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

- d. Click Save. The fields will display across the page. They will not all display on the screen, however, when you print the service records, all the fields will be visible

The screenshot shows a web form with a toolbar at the top containing icons for navigation, search, and text formatting (bold, italic, underline, strikethrough). Below the toolbar are several input fields:

- Name - First Name
- Name - Middle Name
- Name - Last Name
- Social Security Nbr

Below these fields is a section labeled "EMPLOYEE SIGNATURE:" with a large empty text box.

Next is a section labeled "SERVICE INFORMATION:" with a table of input fields:

School Year	State or Country	County or Equivalent	School District or Institution	Public or Private	Position Held	Position (Line 2)

Finally, there is a section labeled "LEAVE INFORMATION:" with a table of input fields:

School Year	Sick Leave - Prior Balance	Sick Leave - Earned	Sick Leave - Used	Sick Leave - Ending Balance	Personal Leave - Prior Balance

10. Press your Enter key three times. Click Fields > Service Record Detail Information > Add New Detail Area



a. In the "Detail Area Name", type "Notes"

The screenshot shows a dialog box titled "Detail Area Name". It contains a text input field with the text "Leave Info" entered.

b. For Display Options, check the box for "Create Block Information Horizontally"

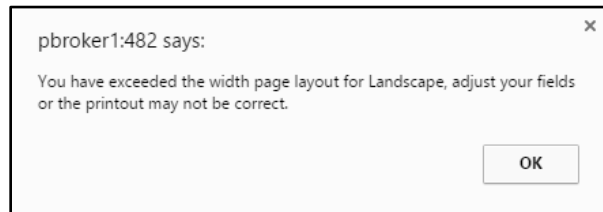
The screenshot shows a dialog box titled "Display Options". It contains a checked checkbox labeled "Create Block Information Horizontally".

c. Select the following fields – in this order (and be sure that box boxes get checked)

- i. School Year
- ii. Notes

Service Records Fields				
Available Fields			Edit All Ranges	
Move	Field	Select	Display	Ranges
	School Year	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
	Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

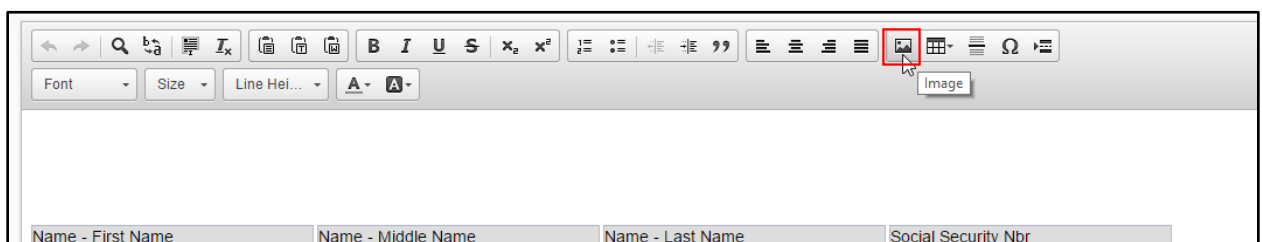
- d. If you get a pop up message indicating that you have exceeded the width of the page, that is ok. Just click OK.



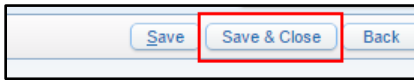
- e. Click Save. The fields will display across the page.

Name - First Name	Name - Middle Name	Name - Last Name	Social Security Nbr			
EMPLOYEE SIGNATURE:						
SERVICE INFORMATION:						
School Year	State or Country	County or Equivalent	School District or Institution	Public or Private	Position Held	Position (Line 2)
LEAVE INFORMATION:						
School Year	Sick Leave - Prior Balance	Sick Leave - Earned	Sick Leave - Used	Sick Leave - Ending Balance	Personal Leave - Prior Balance	
School Year	Notes					

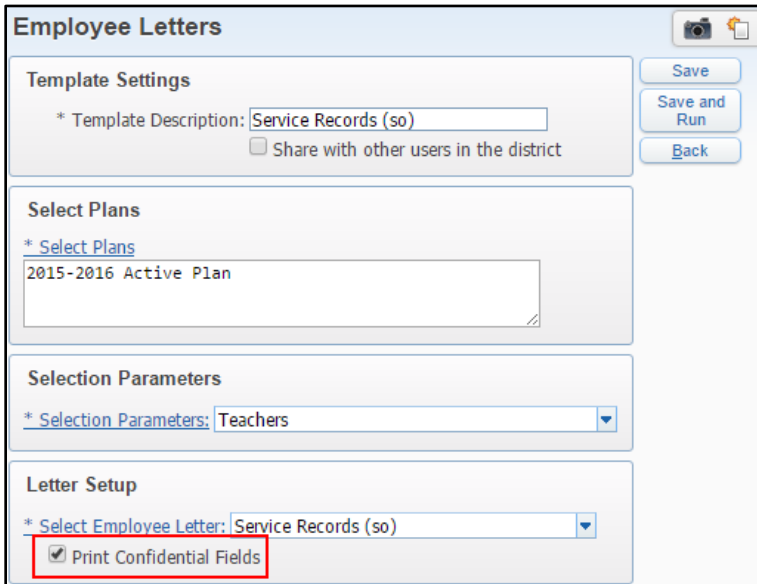
11. If you wish to add in a logo or image of some kind at the top of the page, use your mouse to place your cursor in the blank space at the top. Use the Image icon to select an image to insert.



12. Click Save and Close



13. Close out of the template screen so that you are back on the “Employee Letters” screen. In the Letter Setup section, be sure you check the box for “Print Confidential Fields”.

The screenshot shows the 'Employee Letters' configuration interface. It has a title bar with a camera icon and a document icon. The main content is organized into four sections: 'Template Settings', 'Select Plans', 'Selection Parameters', and 'Letter Setup'. On the right side, there are three buttons: 'Save', 'Save and Run', and 'Back'. In the 'Template Settings' section, the 'Template Description' is 'Service Records (so)' and the 'Share with other users in the district' checkbox is unchecked. In the 'Select Plans' section, the 'Select Plans' dropdown is set to '2015-2016 Active Plan'. In the 'Selection Parameters' section, the 'Selection Parameters' dropdown is set to 'Teachers'. In the 'Letter Setup' section, the 'Select Employee Letter' dropdown is set to 'Service Records (so)' and the 'Print Confidential Fields' checkbox is checked. The 'Print Confidential Fields' checkbox is highlighted with a red rectangular border.

14. Save and Run

15. Once the letters have been generated, you can run the Post Employee Letters option to post them to Employee Access, if you wish